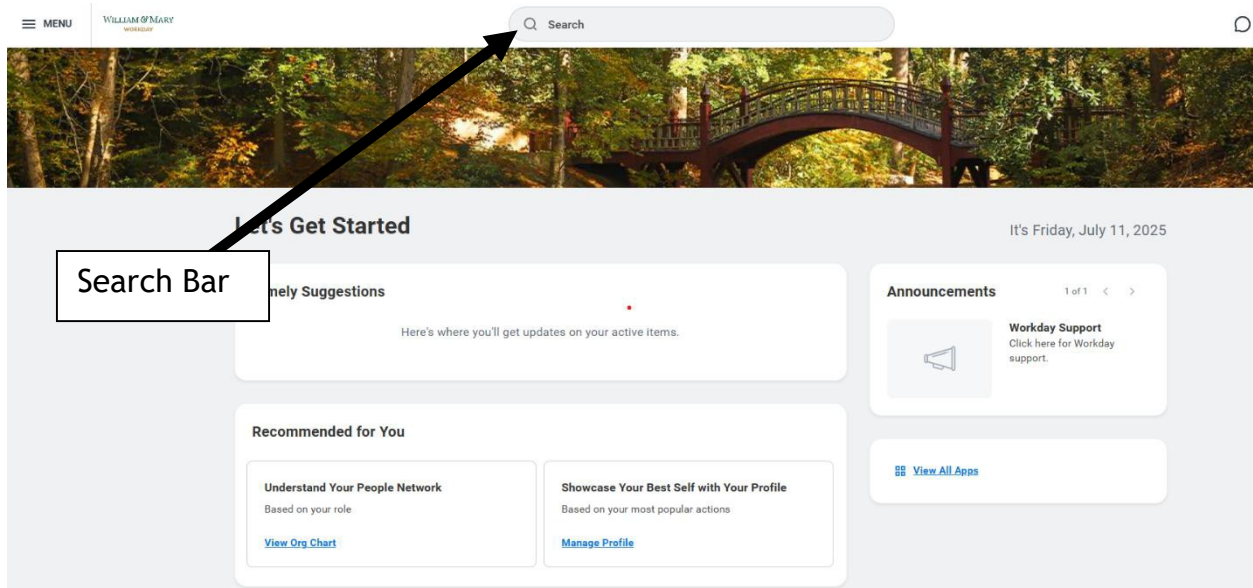# Workday Budget Reporting Tutorial – Budget vs. Actuals

1. Log into Workday
2. Using the search bar on the home page, type in "WM Budget vs Actual by Cost Center – Designated"



3. A pop-up screen will appear that will ask for information such as: Company, Organization, Time Period, and Period (see below image).



4. Fill in the information for each text box.

a. Companies are organizations that represent the internal business entities (WM001 = William and Mary, WMF01 = William and Mary Foundation)
b. Organization can be searched using Cost Centers, Cost Center Hierarchies, Designated, Fund, Gift, amongst other categories.
- Cost Center Hierarchies are an easy way to view budgets for an entire business unit. Several commonly used WM001 cost center hierarchies can be found below.
  - Athletics – CCHW0106
  - Business Affairs – CCHW0108
  - Internal Audit – CCHW0105
  - President – CCHW0101
  - Provost – CCHW0103
    - Academic Affairs - CCHW0228
    - Applied Research Center - CCHW0225
    - Costal Resilience Collaborative – CCHW0226
    - Enrollment Management - CCHW0232
    - Entrepreneurship - CCHW0231
    - Faculty Affairs and Development - CCHW0230
    - International Affairs - CCHW0219
    - Planning and New Ventures - CCHW0219
    - Provost - CCHW0214
    - Provost's Office - CCHW0215
    - Registrar - CCHW0227
    - Research and Grad Studies - CCHW0216
    - School of Arts and Sciences - CCHW0222
    - School of Business – CCHW0223
    - School of Computing Data Science Physics - CCHW0220
    - School of Education – CCHW0218
    - School of Law – CCHW0224
    - School of Marine Science – CCHW0221
    - University Libraries - CCHW0217
  - Student Affairs – CCHW0102
  - University Advancement – CCHW0104
  - University Operations – CCHW0107
c. Time Period can be used to specify a fiscal period over time
d. Period can be used to specify the posting period

5. You can save your filter for future searches



**WM Budget vs Actual by Cost Center - Designated**

| | | |
|---|---|---|
| Company * | ✕ WM001 William & Mary ⋯ | ☰ |
| Organization * | Cost Center: CC00456 ✕ WM001 \| WMUO \| Budget & Financial Planning ⋯ | ☰ |
| Time Period * | ✕ Current Period YTD ⋯ | ☰ |
| Period * | ✕ FY2026 - P01 Jul | ☰ |

Budget & Financial Planning

Manage Filters          Save

0 Saved Filters

**Name filter and click save**

Cancel          OK

6. Click "OK"
   a. You will see a budget vs Actual report generated based on your search criteria.



61 items

| Cost Center | Designated | Ledger Account Type | Ledger Account | Fund | Program | Budget | Actuals | Obligations | Net |
|---|---|---|---|---|---|---|---|---|---|
| CC00141 WM001 \| PROV \| Business - Deans Office | DS005819 WM001 Dean Sch of Business Administration (120126) | Expense | 60003:Salaries and Wages | FD03001 Higher Education Departmental Operating | 10460 Academic Administration | 582,336.00 ▾ | 0.00 | 0.00 | 582,336.00 |
| CC00141 WM001 \| PROV \| Business - Deans Office | DS005819 WM001 Dean Sch of Business Administration (120126) | Expense | 60004:Fringe Benefits | FD03001 Higher Education Departmental Operating | 10460 Academic Administration | 190,051.00 | 0.00 | 0.00 | 190,051.00 |
| CC00143 WM001 \| PROV \| School of Business - Administration | DS005823 WM001 School of Business Administration (120064) | Expense | 60003:Salaries and Wages | FD03001 Higher Education Departmental Operating | 10110 General Academic Instruction | 16,107,068.00 | 0.00 | 0.00 | 16,107,068.00 |
| CC00143 WM001 \| PROV \| School of Business - Administration | DS005823 WM001 School of Business Administration (120064) | Expense | 60004:Fringe Benefits | FD03001 Higher Education Departmental Operating | 10110 General Academic Instruction | 4,136,423.00 | 0.00 | 0.00 | 4,136,423.00 |
| CC00143 WM001 \| PROV \| School of Business - Administration | DS005823 WM001 School of Business Administration (120064) | Expense | 71500:Budget - Continuous Charges | FD03001 Higher Education Departmental Operating | 10110 General Academic Instruction | 8,574.00 | 0.00 | 0.00 | 8,574.00 |
| CC00143 WM001 \| PROV \| School of Business - Administration | DS005829 WM001 School of Business General OPS (120771) ⋯ | Expense | 60003:Salaries and Wages | FD03001 Higher Education Departmental Operating | 10460 Academic Administration | 153,654.00 | 0.00 | 0.00 | 153,654.00 |
| CC00143 WM001 \| PROV \| School of Business - Administration | DS005829 WM001 School of Business General OPS (120771) | Expense | 60004:Fringe Benefits | FD03001 Higher Education Departmental Operating | 10460 Academic Administration | 80,981.00 | 0.00 | 0.00 | 80,981.00 |
| CC00144 WM001 \| PROV \| Business Operations | DS005832 WM001 Off-site Facility Ops (121427) | Expense | 71500:Budget - Continuous Charges | FD03001 Higher Education Departmental Operating | 10110 General Academic Instruction | 175,000.00 | 0.00 | 0.00 | 175,000.00 |
| CC00144 WM001 \| PROV \| Business Operations | DS005833 WM001 Operations (121305) | Expense | 60003:Salaries and Wages | FD03001 Higher Education Departmental Operating | 10460 Academic Administration | 877,985.00 | 0.00 | 0.00 | 877,985.00 |

7. Each Budget, Actuals, and Obligations amount will have a drop-down arrow next to it that will allow you to pull up additional information regarding the line item such as the Supplier as a Worktag, Pay Component, Fiscal Period, and more.



8. Clicking the number (see image above) will bring you to a pop-up screen containing more information depending on the type of transaction.



9. By clicking the magnifying glass, you will be taken to a view plan screen that displays a ledger account summary, amendments, and a total process history for your specific cost center(s).

10. Upon returning to Budget vs Actual by Cost Center – Designated home screen, you can edit your search with new criteria such as Cost Center, Program, Gift, Designated, etc. by clicking the filter button to the right of the title (see image below).



**WM Budget vs Actual by Cost Center - Designated**

| | |
|---|---|
| Company | WM001 William & Mary |
| Organization | Cost Center: CC00456 WM001 \| WMUO \| Budget & Financial Planning |
| Time Period | Current Period YTD |
| Period | FY2026 - P01 Jul |

This composite report presents the YTD Budget, Actuals, Obligations, Budget Variance and Percentage of budget used by Cost Center and Driver Worktags. This report is prompted for a given Company, Cost Center, Plan and Fiscal Period.